

Retention and Classification Report

Agency: South Davis Water Improvement District (Utah) (2168)

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Records Officer Tracie Gallagher

28673 Annual budget and audit reports
28413 Employee personnel files

AGENCY: South Davis Water Improvement District (Utah)

SERIES: 28673

3

TITLE: Annual budget and audit reports

DATES: 1954-

ARRANGEMENT: Chronologically by year

DESCRIPTION:

These records support the agency's fiscal function to annually prepare a budget and perform an audit (Utah Code 51-2a-202(2004)). Records document the approved annual budget and any subsequent amendments (Utah Code 17-36-15(2012)). Records also document the auditor's findings, written opinion, and recommendations for improvement. Information includes related financial data and supporting documentation.

RETENTION:

Retain 15 years.

DISPOSITION:

Transfer to the State Archives with authority to weed.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule CNT 3, Item 1.

AUTHORIZED: 03/27/2015

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 15 years and then transfer to State Archives.

APPRAISAL:

Administrative Fiscal Historical

AGENCY: South Davis Water Improvement District (Utah)

SERIES: 28673

TITLE: Annual budget and audit reports

(continued)

PRIMARY CLASSIFICATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 04/2015.

AGENCY: South Davis Water Improvement District (Utah)

SERIES: 28413

3

TITLE: Employee personnel files

DATES: 1954-

ARRANGEMENT: Chronological thereunder alphabetical by last name

DESCRIPTION:

These records support the agency's administrative function to manage its human resources. These records document the hiring and employment of individuals. Information includes the original application, records necessary to calculate benefits, related professional training, and any final disciplinary actions or grievances.

RETENTION:

Retain 65 years from date of employment or 7 years after retirement or death.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 11, Item 62.

AUTHORIZED: 02/23/2015

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 25 years after date of employment and then transfer to State Records Center. Retain in State Records Center for 40 years and then destroy.

APPRAISAL:

Administrative Legal

Legal appraisal is based on retention requirement stated in Utah Code 49-11-602(2014).

AGENCY: South Davis Water Improvement District (Utah)

SERIES: 28413

TITLE: Employee personnel files

(continued)

PRIMARY CLASSIFICATION:

Private Utah Code 63G-2-302(2)(a)(2014)

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 03/2015.